



Estate Planning: Specific Assets

Presented by the Surrogate's Court Committee

Wednesday, May 22, 2018

Templeton Landing, Two Templeton Terrace, Buffalo, NY

4.0 CLE credits: 3.5 Areas of Professional Practice, 0.5 Ethics

8:15 a.m.	Registration/check-in/breakfast	10:40 a.m.	BREAK
8:45 a.m.	Opening Remarks Victoria D'Angelo, Esq. <i>Barclay Damon LLP</i> <i>Chair; Surrogate's Court Committee</i> Hon. Acea M. Mosey <i>Erie County Surrogate Court Judge</i>	10:55 a.m.	Non-Probate Assets Sharon L. Wick, Esq. <i>Phillips Lytle LLP</i> Kenneth A. Grossberg, Esq. <i>Phillips Lytle LLP</i>
9:00 a.m.	Real Estate Britta L. McKenna, Esq. <i>Hodgson Russ LLP</i>	11:45 a.m.	Other Considerations Jennifer G. Flannery, Esq. <i>Barclay Damon LLP</i>
9:50 a.m.	Tangible Personal Property Linda Stravalaci Grear, Esq. <i>Pfalzgraf, Beinhauer & Menzies LLP</i>	12:10 p.m.	Ethics Joseph A. Shifflett, Esq. <i>Chief Court Attorney</i> <i>Erie County Surrogate's Court</i>
10:15 a.m.	Business Interests Rocco Lucente, II, Esq. <i>Cohen & Lombardo, P.C.</i>	12:35 p.m.	Questions
		1:00 p.m.	Adjourn

Erie Institute of Law Registration Form – Estate Planning: Specific Assets

Registration: \$90 BAEC Member \$125 Non-Member \$20 Hard copy of material

The Erie Institute of Law now provides the course material via email. Please include your email address below. If you require a printed copy, please select box above and add \$20 to the registration fee.



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Accreditation: The Erie Institute of Law has been certified by the New York State Continuing Legal Education Board as an accredited provider of continuing legal education in the state of New York.

Cancellation Policy: If you are unable to attend a seminar for which you have already registered, call 852-8687. For a full refund, notice of your cancellation must be received 48 hours before the date of the program. If cancellation is received less than 48 hours before, you will receive a refund minus a \$10 administrative fee. Registrants who are pre-registered and fail to call to cancel or attend will course materials in lieu of a refund.

Special financial arrangements can be made to those who demonstrate financial hardship – please submit request in writing. Determination of financial hardship is decided on a case by case basis.

Mail or Fax to: Erie Institute of Law, 438 Main Street, Sixth Floor, Buffalo, New York 14202, (716) 852-8687, Fax (716) 852-7641. Register online at www.eriebar.org. \$5 additional fee for walk-in registrants.